

Industry Research and Insights Update

COVID-19 tourism industry recovery insights | Tourism Tasmania
May 2022

This report summarises consumer, market and industry insights alongside accommodation demand data, providing a snapshot of the current COVID-19 recovery scenario for Tasmania's visitor economy.



Cover image: Pieman River, Rob Mulally

Recovery Update

COVID-19 recovery tracking insights | Tourism Tasmania
May 2022

Industry update

Tourism Tasmania is actively tracking the recovery of the tourism and hospitality industry, with regular updates through T21 visitor economy strategy and the [industry recovery portal](#). This report focuses on industry recovery by providing a view forward through consumer and industry insights, and data.

Domestic Travel sentiment

Latest national domestic travel insights are from mid-April 2022.

A majority of Australians feel positive about domestic travel, with general 'confidence' recovering, 'travel intention' rebounding after a slight easing in March and 'booking intention' steady. Financial concerns remain the biggest barrier to travel, overtaking concerns of COVID-19 (e.g., contracting the virus, travel restrictions impacting travel) (TA, 14-20 April 2022).

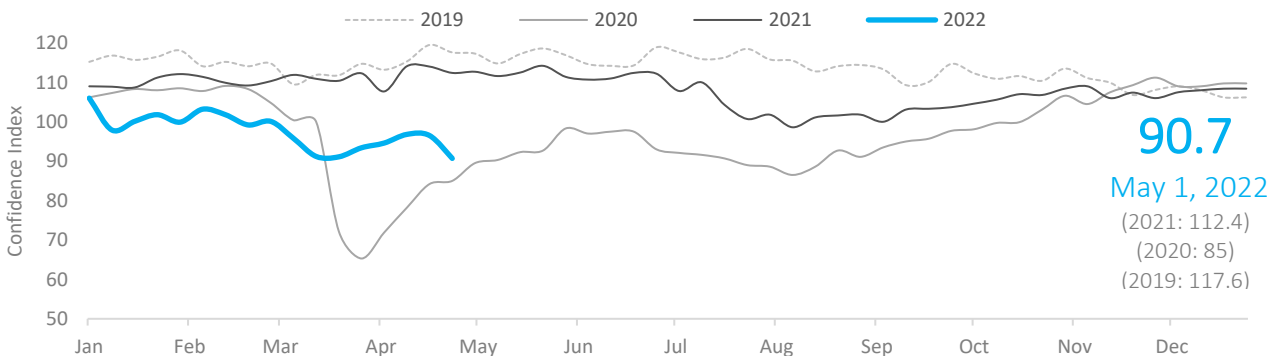
Tasmania's brand health maintained

Tasmania continues to maintain its brand position, including perceptions of Tasmania as 'meaningful' and 'different'. Key domestic markets being impacted by lockdowns in late 2021 affected the consumer journey, with planning and consideration of travel to Tasmania remaining stable. Those actively dreaming of a trip to Tasmania increased, in anticipation of experiencing unrestricted travel. Despite a slight decline in those 'active' in the planning stages, Tasmania remains comparable to competitor destinations (TIM, Dec '21).

Consumer Confidence Index

The ANZ-Roy Morgan [Consumer Confidence](#) Index provides a measurement of Australians' overall confidence across key indicators including personal finance, the national economy, and timing of major purchases.

Consumer Confidence is now at its lowest since Victoria's second wave of COVID-19 in August 2020 and is a significant 22pts below the same week a year ago, May 1-2, 2021 (112.7). The latest CC index is from the beginning of May 2022, coinciding with the largest fall in the index since early January during the height of the 'Omicron wave' of COVID-19 and came after the ABS reported a CPI of 5.1% for the year to March 2022 – the highest CPI for over 20 years since the introduction of the GST. The drop was compounded by the rising cost of living, including elevated petrol prices and flow-on impacts on consumer goods.



COVID-19 Accommodation Forward Bookings

Tourism Tasmania measures a range of metrics of visitation into the state and across the visitor economy. This has traditionally been predominantly an historical insight, for example through the Tasmanian Visitor Survey, National Visitor Survey and International Visitor Survey.

Accommodation demand is a key indicator of industry and community recovery, and Tourism Tasmania has engaged and worked closely with two providers to deliver meaningful data that broadly represents the range of operators in Tasmania's accommodation sector.

- + **STR:** Hotels, motels and other commercial accommodation with more than three rooms. Forward data focuses on occupancy per cent rates.
- + **AirDNA:** Short-stay accommodation, such as Airbnbs. Forward data includes in this report focuses on demand (booked nights currently in the system).

Hotel, motel, lodges etc

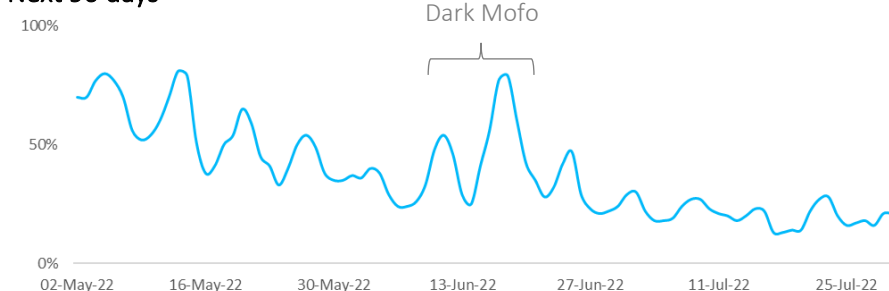
The long-term view of forward bookings continues to reflect a dynamic period for bookings and consumer uncertainty, with this indicated in narrow booking windows. In Hobart, strong bookings in mid-June coincide with Dark Mofo and have experienced pick-up in bookings over the past month. Demand is building in mid-May and June for Launceston, around the Australian Musical Theatre Festival, AFL game and Launceston Running Festival.

Hobart area occupancy on the books | at 2 May 2022

Next 3 months

	This year	Last year	%pt change
May	56%	47%	-6
June	38%	38%	-2
July	21%	25%	-8

Next 90 days



Launceston area occupancy on the books | at 2 May 2022

Next 3 months

	This year	Last year	%pt change
May	41%	37%	+2
June	16%	15%	-2
July	10%	8%	-1

Next

90 days



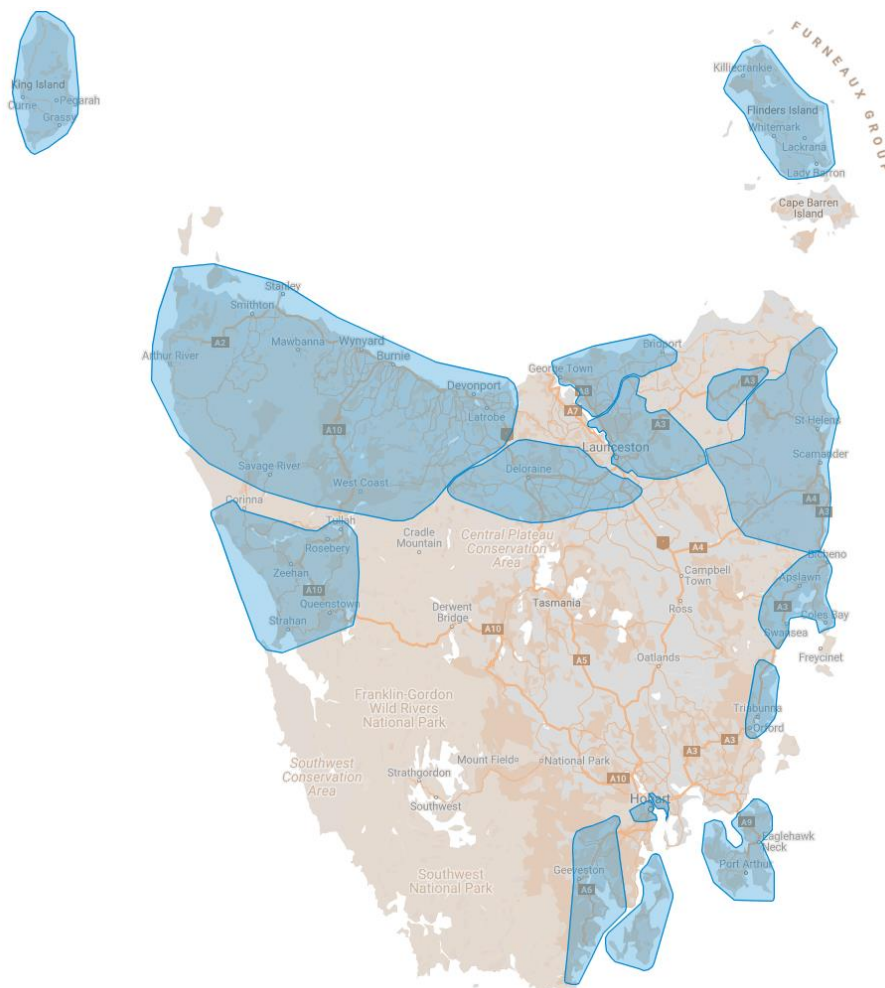
Help us improve this data

Providers of hotel, motel, lodge and similar accommodation are invited to join the free STR program to help us monitor this important sector. Please contact Tom tchappel@str.com to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

Short stay accommodation forward bookings

The AirDNA short-stay accommodation **forward demand** (booked nights) data provides insight into this sector of the industry at a state level plus Hobart, Launceston, and regional zones, for the next 12 weeks. The zones have been created to represent a range of urban and regional areas in the state on Airbnb and VRBO; the state level includes all 'entire places' listed in Tasmania in the period.

<p>Hobart</p> <p>Hobart City Council</p>	<p>Launceston</p> <p>Launceston City Council</p>	<p>West Coast</p> <p>West Coast Council</p>	<p>Bruny Island</p> <p>North & South Bruny</p>
<p>Tasman Peninsula</p> <p>Tasman Council</p>	<p>Huon - Far South</p> <p>Huon Valley Council</p>	<p>King Island</p> <p>King Island Council</p>	<p>Flinders Island</p> <p>Flinders Council</p>
<p>Derby</p> <p>Derby, Branxholm, Ringarooma, Pioneer</p>	<p>Eastern Shore (Hobart)</p> <p>Geilston Bay to Tranmere, Mornington</p>	<p>Orford</p> <p>Orford, Spring Beach, Triabunna, Little Swanport</p>	<p>Freycinet</p> <p>Coles Bay, Swanwick, Bicheno, Swansea</p>
<p>North West</p> <p>7 LGAs:</p> <p>Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish and Latrobe</p>	<p>North East Coast</p> <p>Bay of Fires, St Helens, Welborough, Douglas River</p>	<p>East Tamar – Bridport</p> <p>George Town Council, Bridport</p>	<p>Deloraine – Evandale</p> <p>Deloraine, Mole Creek, Westbury, Evandale</p>



The table below provides a comparison of demand for the next three months, compared to the same time last year and two years ago. Additionally, the last three columns allow comparison of share of the total state demand (booked nights) by region, highlighting the impacts to city and urban stays.

AirDNA | Demand (booked nights) in the next 3 months | 2 May 2022 to 18 July 2022

	2022	2021	% change	2019	% change	% share of state demand for this period in:		
						2022	2021	2019
Tasmania	72,482	62,423	16%	56,936	27%			
Hobart	17,975	14,464	24%	20,666	-13%	24.8%	23.2%	36.3%
Launceston	5,466	5,270	4%	5,732	-5%	7.5%	8.4%	10.1%
King Island	699	567	23%	423	86%	0.8%	1.0%	1.2%
Flinders Island	545	641	-15%	204	437%	1.1%	1.3%	0.6%
East Tamar-Bridport	1,274	1,231	3%	1,325	75%	2.3%	2.1%	3.7%
Deloraine-Evandale	2,042	1,714	19%	1,190	147%	2.9%	2.7%	3.4%
Derby	922	889	4%	671	216%	2.1%	2.0%	1.9%
Orford	868	742	17%	672	141%	1.6%	1.6%	1.9%
Tasman Peninsula	1,853	1,923	-4%	847	245%	2.9%	3.1%	2.4%
Bruny Island	3,768	3,482	8%	1,543	243%	5.2%	5.4%	4.3%
Huon-Far South	3,081	2,824	9%	1,600	152%	4.0%	4.3%	4.5%
Eastern Shore (Hobart)	2,343	1,881	25%	965	174%	2.6%	2.7%	2.7%
Freycinet	6,878	5,022	37%	2,958	256%	10.4%	8.4%	8.3%
NE Coast	3,308	3,328	-1%	2,249	177%	6.2%	6.8%	6.3%
West Coast	2,054	1,328	55%	686	311%	2.8%	2.7%	1.9%
North West	6,180	4,619	34%	3,122	200%	9.3%	8.5%	8.8%

The charts on the following pages provide a view forward over the coming 12 weeks, based on bookings as at the week commencing **May 2, 2022**. The data refers to properties listed as 'entire places', where guests have the whole home/property to themselves (approximately 85% of listed properties in Tasmania).

Each chart also shows bookings relative to the above date, that were in place as of:

- + **Demand** in 2022 | Solid blue line. Booked nights in the system as of the start date.
- + **Demand** four weeks ago | Dotted blue line. Refers to demand that was in place four weeks ago.
- + **Demand** in 2021 | Solid grey line. This refers to the same month in 2021.
- + **Demand** in 2019 | Dotted grey line. This refers to the same month in 2019.

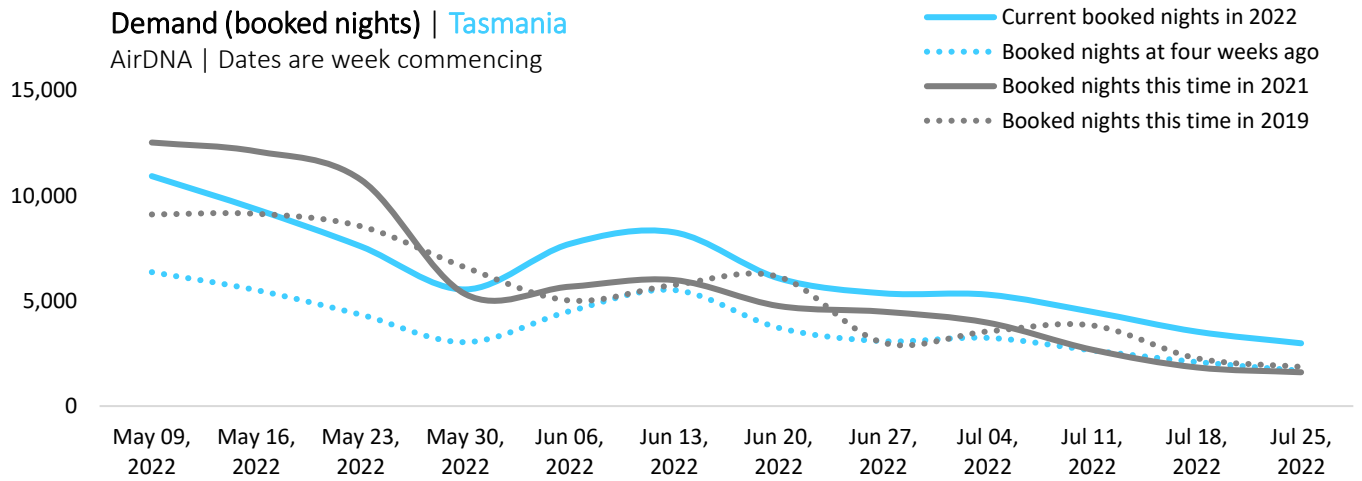
Tasmania | Short-stay accommodation

At the state level, demand coming off Easter remains elevated, and then follows the 2021 trend through May. State-wide demand over the next three months is 27% higher than this time in 2019. For the next 3 months, all of the tracked regions experienced pick-ups in bookings compared to the same time 4 weeks ago, which is a positive outlook for both regional and city accommodation.

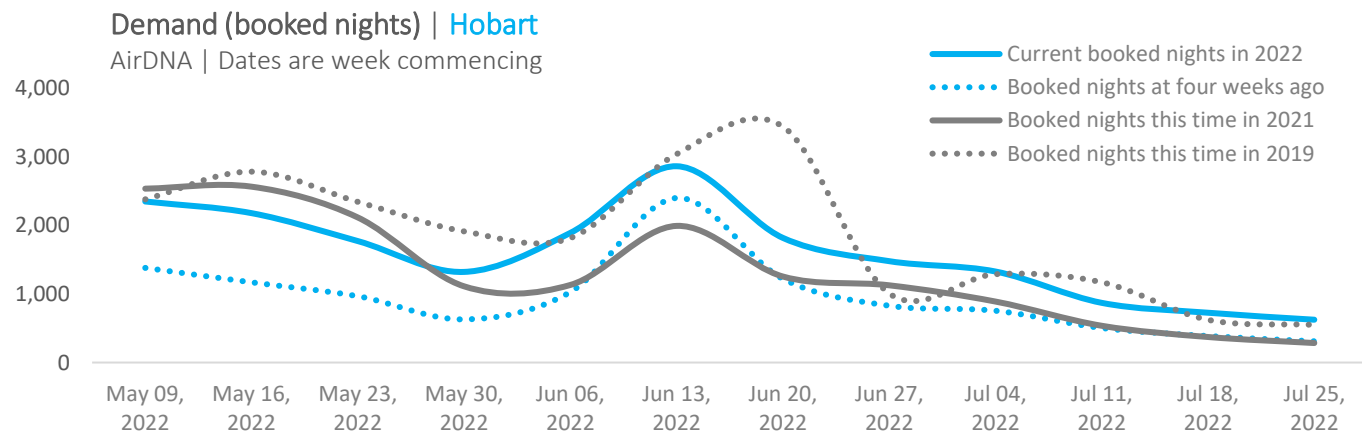
Looking forward, overall demand (booked nights) for short-stay accommodation (solid blue line) is indicating improvements from previous years. The dotted blue line (booked nights at four weeks ago) indicates that there is a sustained pick-up of bookings, with reduced booking windows remaining in play. The level of demand in place for May is now ahead of the demand recorded in May 2019, meaning a particularly strong recovery for this period in this sector.

At this time in 2021, Tasmanians were able to enjoy unrestricted intrastate travel, and interstate travel had resumed from most interstate destinations, with some experiencing travel restrictions.

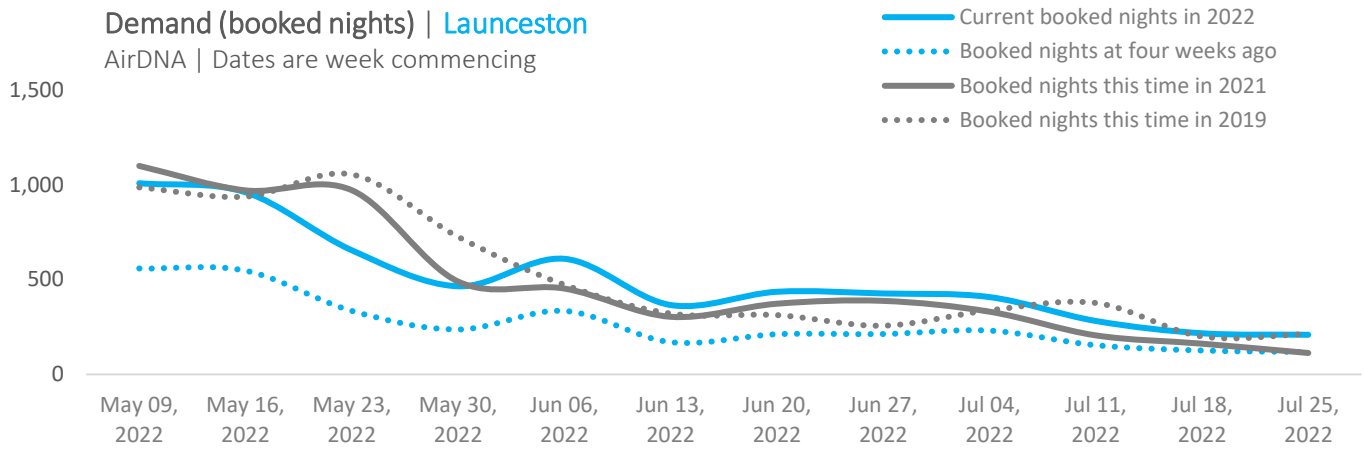
TASMANIA | Short-stay accommodation



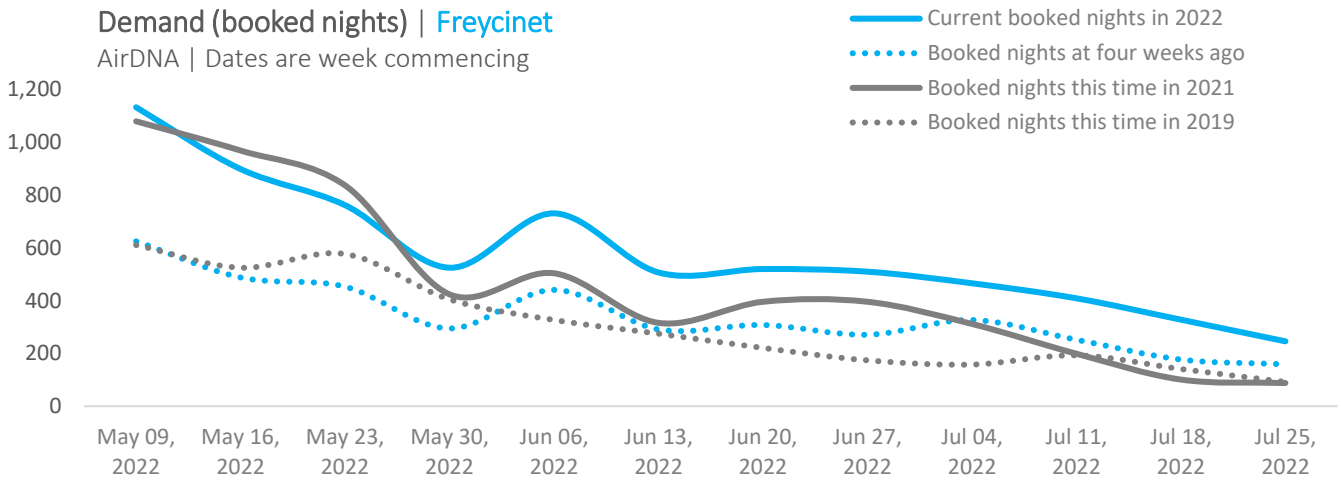
Hobart | Short-stay accommodation



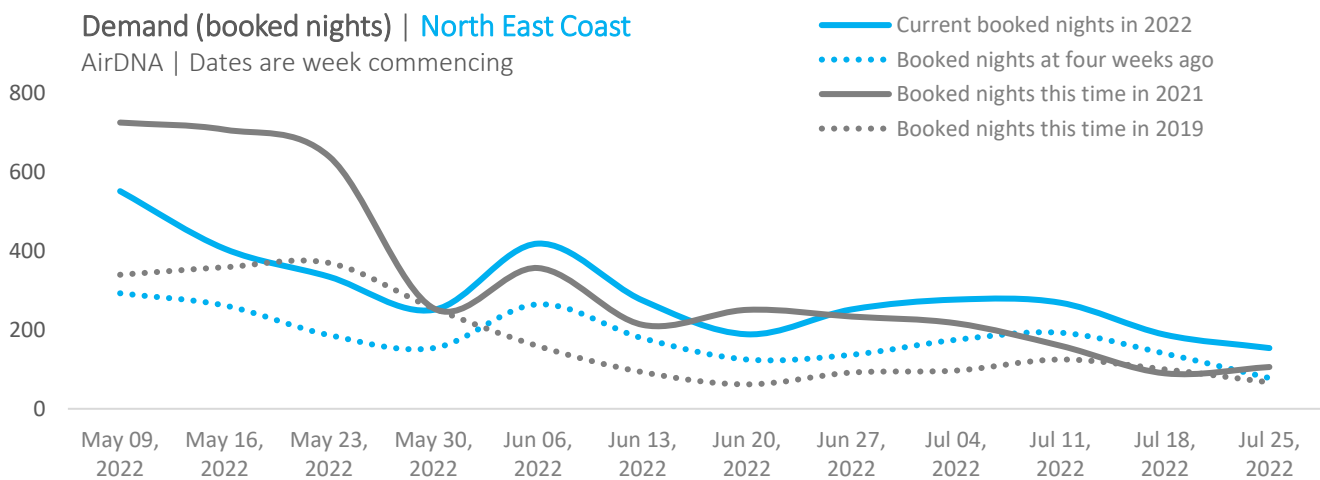
Launceston | Short-stay accommodation



Freycinet | Short-stay accommodation



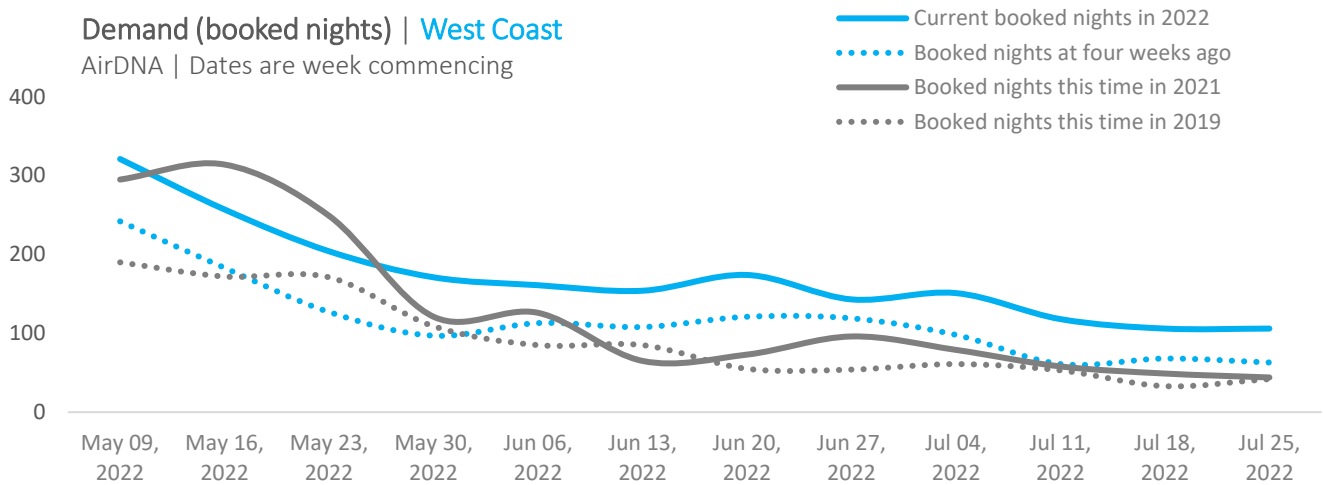
North East Coast | Short-stay accommodation



West Coast | Short-stay accommodation

Demand (booked nights) | West Coast

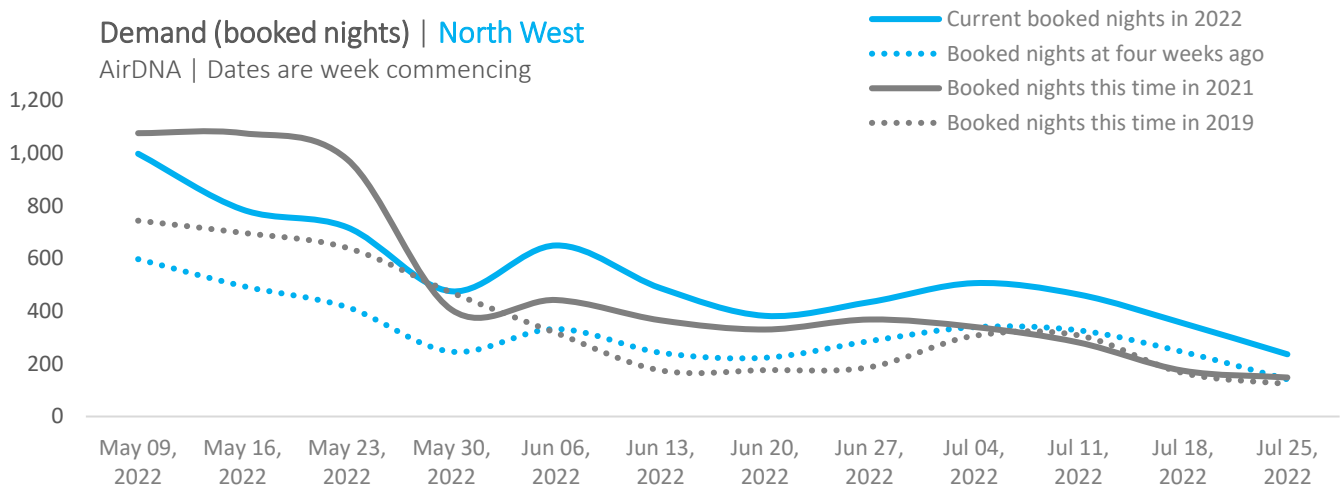
AirDNA | Dates are week commencing



North West | Short-stay accommodation

Demand (booked nights) | North West

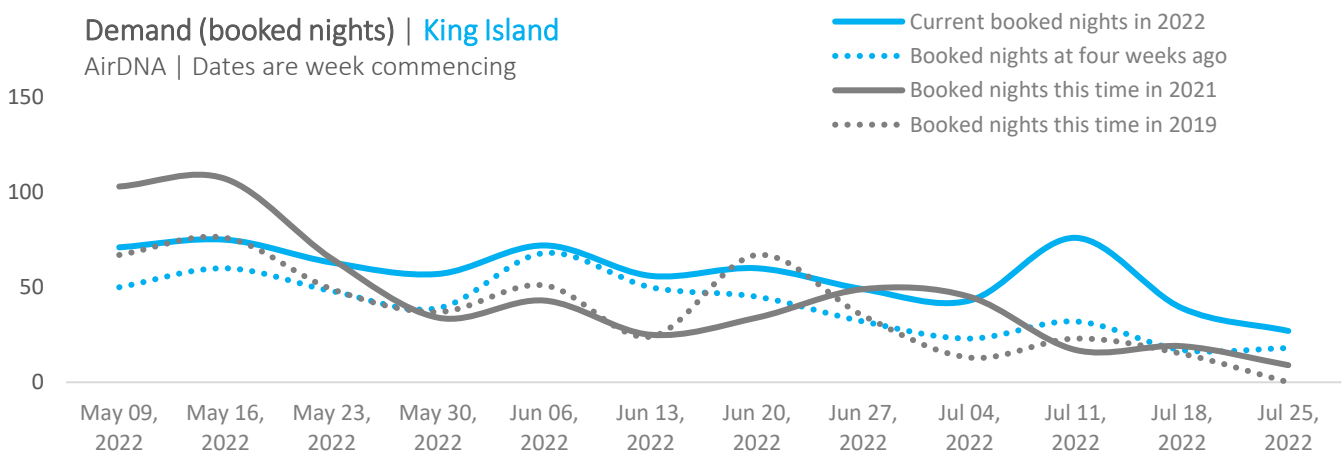
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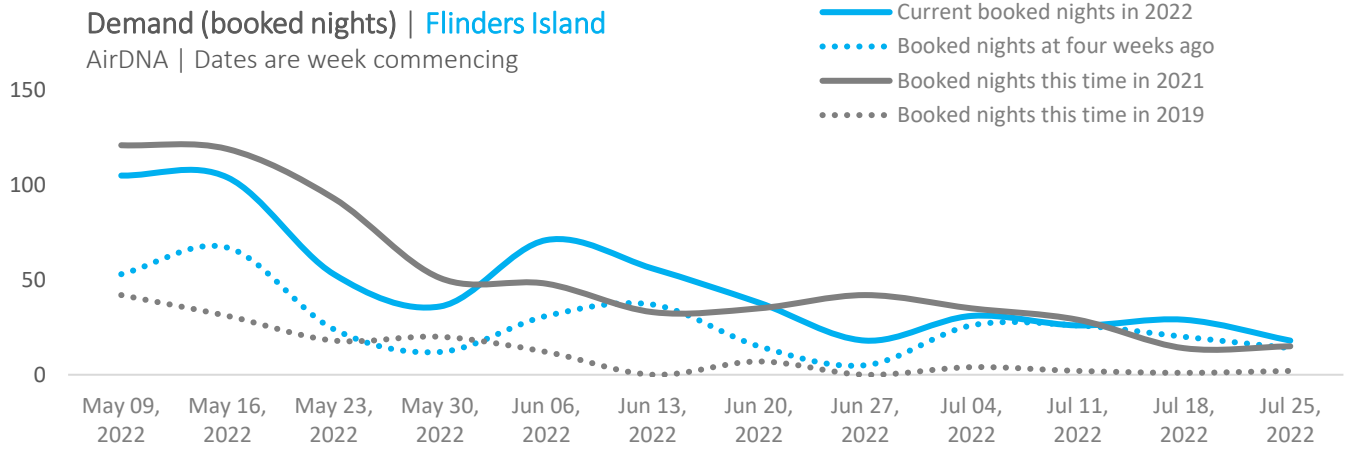
King Island | Short-stay accommodation

Demand (booked nights) | King Island

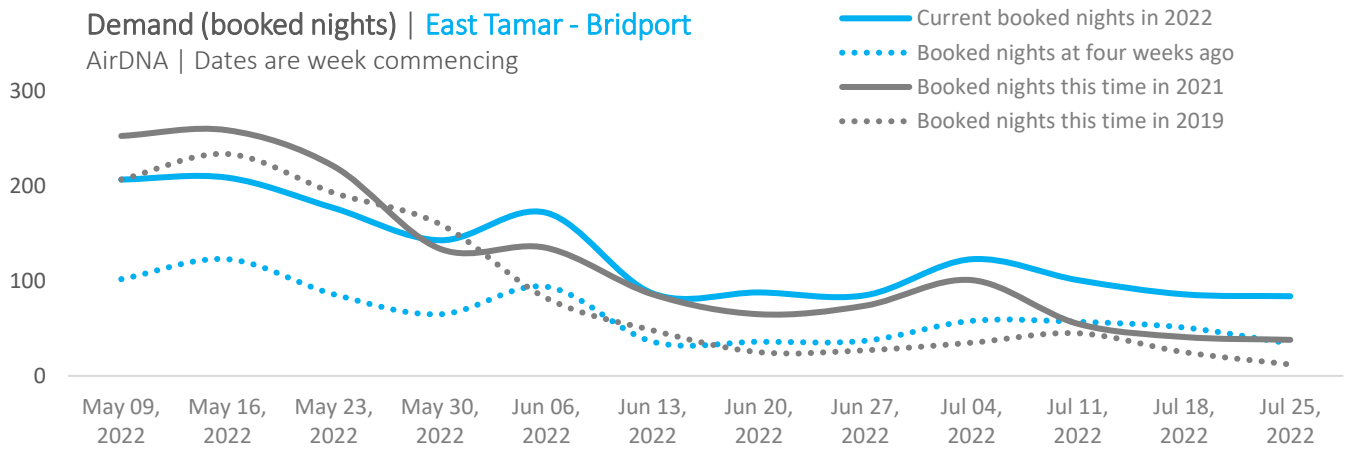
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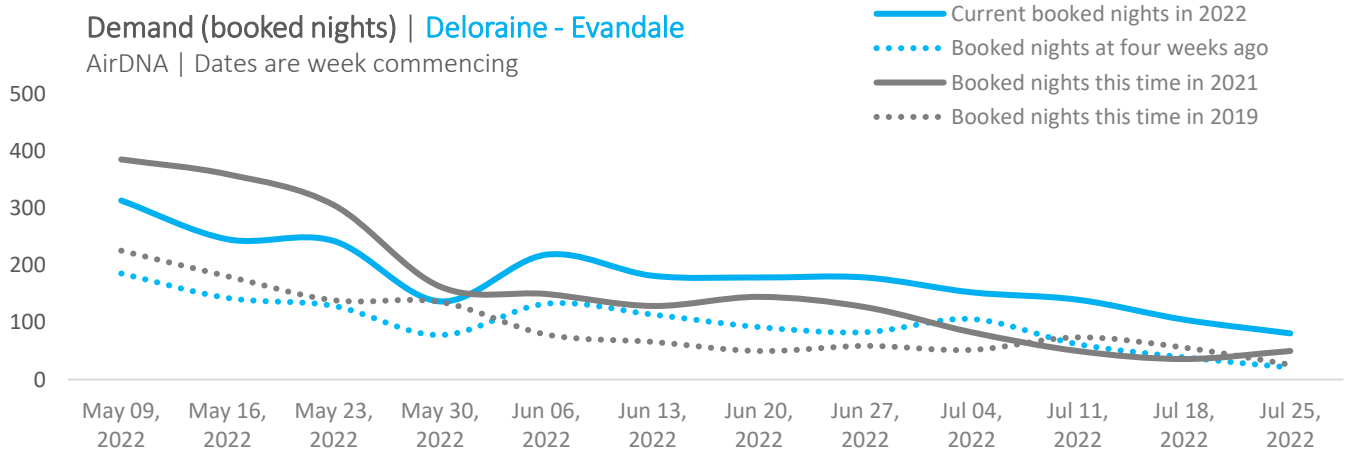
Flinders Island | Short-stay accommodation



East Tamar - Bridport | Short-stay accommodation



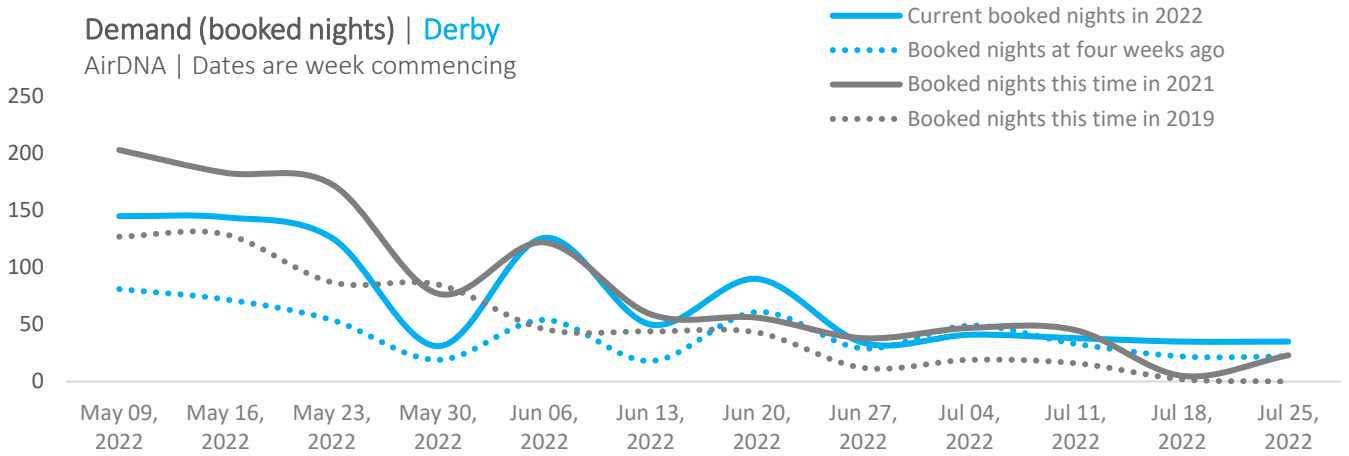
Deloraine – Evandale | Short-stay accommodation



Derby | Short-stay accommodation

Demand (booked nights) | Derby

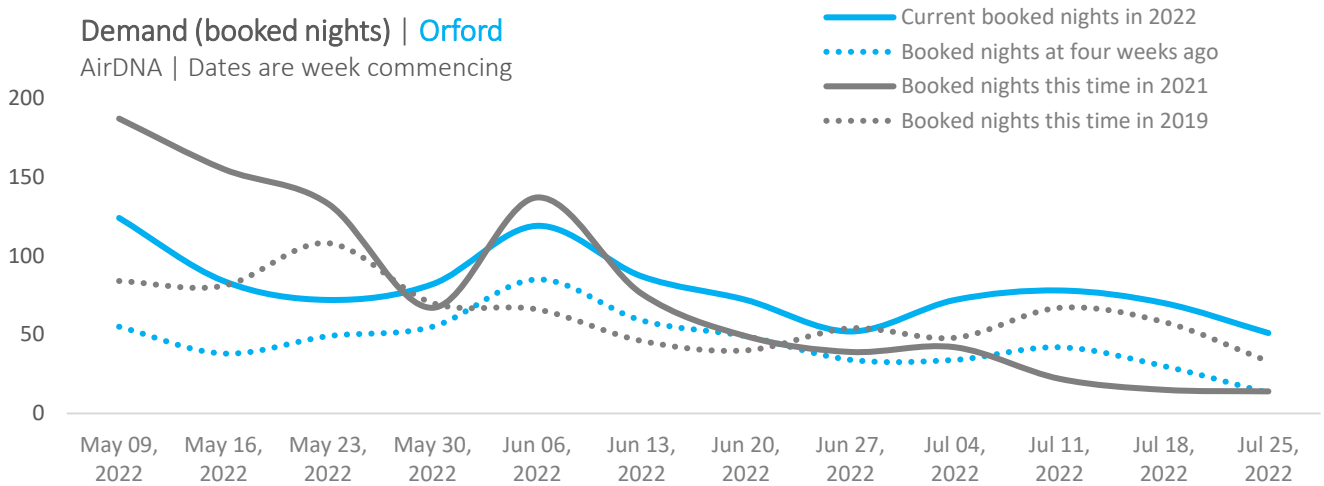
AirDNA | Dates are week commencing



Orford | Short-stay accommodation

Demand (booked nights) | Orford

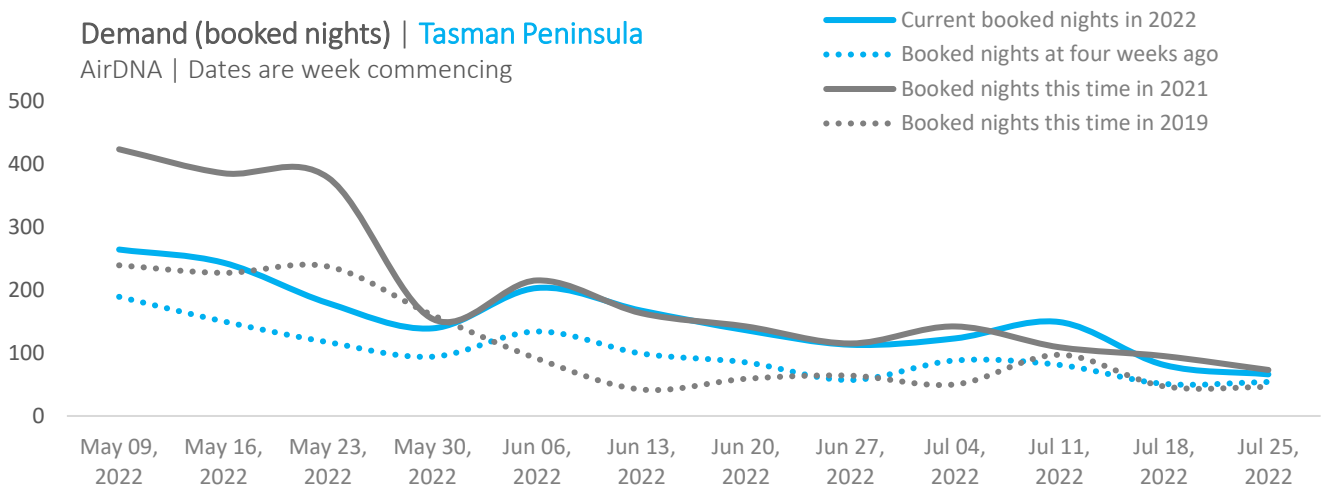
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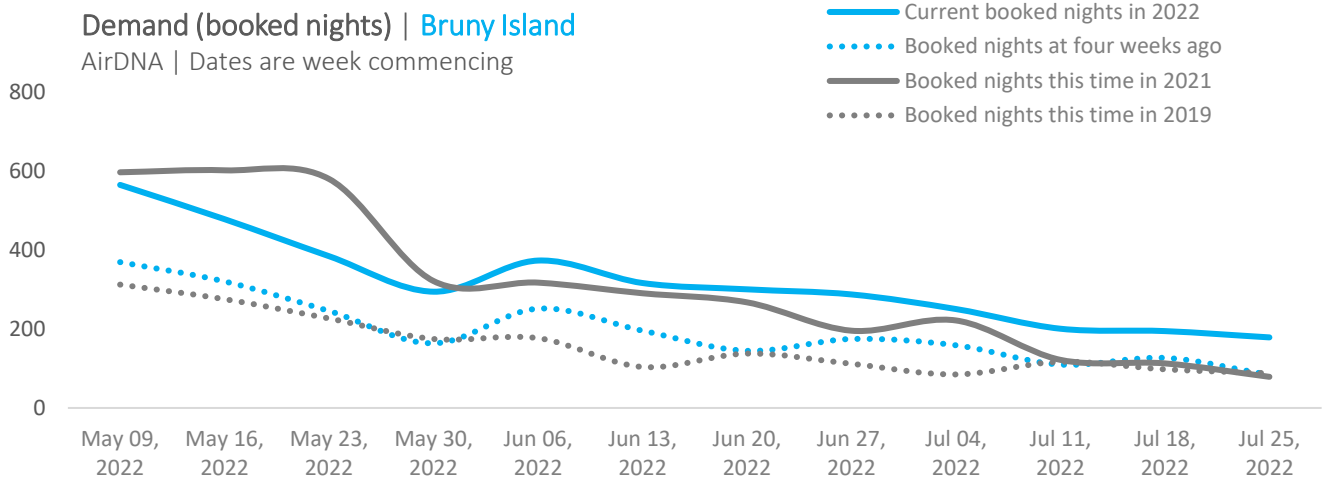
Tasman Peninsula | Short-stay accommodation

Demand (booked nights) | Tasman Peninsula

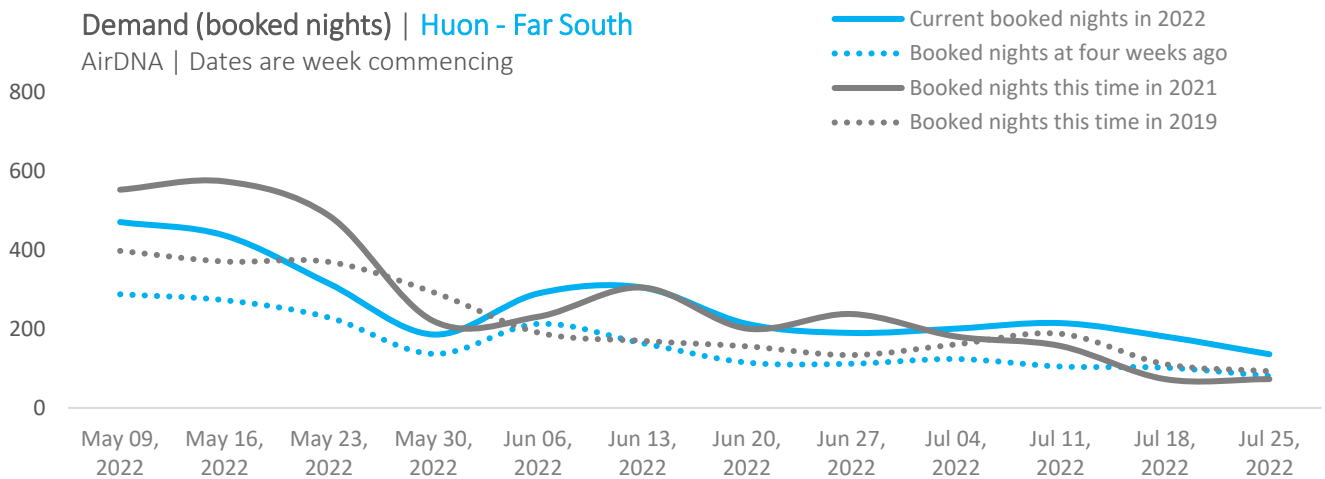
AirDNA | Dates are week commencing



Bruny Island | Short-stay accommodation



Huon – Far South | Short-stay accommodation



Eastern Shore (Hobart) | Short-stay accommodation

